

Narrative

1. Project Design

Project Goal and Activities

The Goal of this project is to improve intellectual control of collections entrusted to the Museum of History and Art, Ontario in order to assure professional stewardship and enhance use of collections for research, planning and developing exhibitions, and other public programs. With a fuller understanding of the collections, on-going management and care will improve. Future projects to improve housing, conservation and access can be identified and funding sought. Future enhancements to existing facilities and/or building expansion projects affecting collections storage can be designed using accurate, responsible data rather than existing estimates. Project activities will include physical inventory of the entire collection, review and revision of existing paper records, accessioning and physical numbering, digital photography and data entry of catalog information into Past Perfect collections management software. A limited amount of re-housing of artifacts will also occur as the project team works its way through the collections.

The museum has approximately 25,000 items in its collections. Much of the museum's collections were received in bulk – large numbers of items in single source donations. In the mid 1990s, two large collections from pioneer-era families were donated within two years of each other at the very time the museum's small staff were involved in phased building renovation projects and exhibition and public program development projects. During this time, museum staff concentrated on the basics of collections stewardship – proper review and acceptance by the museum's Collections Committee, completing transfer of ownership documentation, and, in most cases, assigning accession numbers. Collections were tagged or stored in boxes (many archival but not all) clearly marked by source name, accession number or temporary receipt number. As a result, the museum has legal title for and accession numbers have been assigned to nearly all of its collections. Few items have been physically numbered, however, and only trial-run data has been entered into the PastPerfect database. This project will address this backlog in registration and data-entry and accomplish some remedial rehousing. Collections are stored in several locations. The main collections storage area is a 1280 sq. ft. secured and separately alarmed space on the museum's second floor. In this area, collections are stored on metal shelving, in cabinets and in open-floor storage. Other collections are stored in the Curator's office, in three vaults located on the main floor and in off-site locations owned by the City of Ontario which is the museum's parent organization. Collections are also on display in the museum's permanent exhibitions.

Project team members will conduct a shelf by shelf inventory of all spaces beginning with the upstairs collections storage area, continuing to the Curator's office, the downstairs vaults and exhibition areas, and off-site locations. They will examine items for accession number marking, id tags or other identification. They will review existing paper records including catalog cards, donor forms, temporary receipts and Collections Committee minutes to determine if the item has been assigned a number but not marked, accepted by the Collections Committee but not assigned an accession number, etc. The accession process will be completed for each object and worksheets will be completed for use in Past Perfect data entry. Individual items will be evaluated for digital photography and photographed. Objects stored in non-archival materials or deteriorated archival products will be rehoused. Data from the worksheets and digital photographs will be entered into PastPerfect.

The project includes technology purchases and upgrades including a server with Tape Back-up, a lightweight laptop computer, and a digital camera. Software purchases include a PastPerfect Version 4.0 upgrade, network upgrade for 2-5 users, a multimedia upgrade and annual support. Funds are also included for the Curator to attend a two-day training session on PastPerfect presented by the vendor, Pasttime Software, Inc.

The majority of project activities will take place in a designated workspace within collections storage. Work tables, a photography area and data entry workstation will be part of this workspace. The laptop computer will be used to facilitate the inventory of collections objects located off-site, in the downstairs vaults and exhibitions.

Project Team, Management and Evaluation

The Project Team will include two Museum Assistants, the Museum Curator and the Museum Director. The part-time Museum Assistants will be hired with IMLS grant funds to conduct the inventory, mark and photograph objects and prepare and complete the data entry. The Museum Curator will supervise the Museum Assistants, participate in the workflow as needed and monitor project activities. The Museum Director will serve as Project Director and Administrator. Some collections volunteers have also expressed interest in being involved in the project and are expected to provide additional help once the procedures have been tested and are working smoothly enough for volunteer tasks to be identified. Both Museum Assistants will be trained in all aspects of the workflow -- physical inventory, accession research and numbering, photography and data entry. This should prevent backlogs in one step or other and serve as a safety net should absence or vacancy occur during the grant period. "Problem" items for which status cannot be quickly or easily identified will be researched by the Curator and returned to the workflow for processing. The Curator will follow up on any items for which legal title is uncertain to secure transfer of title and/or begin documenting the object's custody at the museum per California's abandoned property law.

Grant funds will be appropriated in the City of Ontario's First Quarterly Budget Review generally approved by the City Council in late October. Recruitment for the Museum Assistants will begin in November and the positions should be filled by the beginning of 2008. Project evaluation will be on-going with procedural changes made any time necessary. Three Project Team Conference Meetings will be held roughly coinciding with the six-month IMLS Interim Report schedule. a) The first will occur after about 3 months of full activity to review procedures and workflow and to consider any significant changes including incorporating volunteers in the process. Resulting changes will be reported in the first Interim Report to IMLS. b) The second meeting will occur in October 2008 and include a full review of activities, accomplishments and challenges to be reported in the second Interim Report. c) The third meeting will occur six months before the end of the grant period to estimate how much work remains and determine what priorities to set for the grant-funded Museum Assistants and what elements can be continued beyond the grant period by the Curator and volunteers. These results will be reported in the Third Interim report to IMLS.

2. Grant Program Goals

This project directly fulfills the MFA goal of Sustaining Cultural Heritage by improving collections care and management. Both the project itself and the future projects it will enable will improve the museum's ability to care for and utilize the collections. The immediate goal of this project is to eliminate a significant backlog in registration and improve intellectual control of the collection. Consequently, museum staff will be better able to identify sub-groups of collections for future projects such as conservation assessments and treatment, attention from curatorial experts and re-housing for efficiency, object safety and preservation. Museum staff will be better able to access the collections when planning for the museum's own exhibitions and programs. Response to outside research and/or loan requests will also be improved. As city-wide plans that include enhanced or expanded museum facilities are proposed and evaluated and as funding mechanisms are explored, museum staff will be in a position to provide accurate data regarding the significance of the collection and its space, housing and environmental needs.

3. How the Project Fits into Strategic Plan and Mission

Mission and Strategic Plan

This project directly addresses the museum's mission to 'serve and enrich the community by collecting, preserving and interpreting the history of Ontario and its region....' The museum's 1996 Long-Range Interpretive Programs Plan also calls for building adequate historical resources for developing public programs such as permanent and temporary exhibitions and associated educational programs. When the plan was adopted the museum badly needed to provide and quantify its public service levels, build audience and community

support and generate private financial support. As a result, public programs took precedence in the implementation of the Interpretive Plan and the museum's small staff concentrated on an active temporary exhibition schedule, providing educational programs, planning and installing permanent exhibitions and planning and developing a docent program. Collections continued to grow, however, and although collections management efforts were limited during this time, important interim steps were taken. A reinvigorated Collections Committee updated collections practices, adopted the museum's first formal Collections Policy and developed a set of goals for collections development and management. The Committee met quarterly to review offered donations of collections. A MAP Collections Survey conducted in 1998 confirmed that the museum's policies and practices were on the right track and made initial recommendations for improved collections care. Re-directing the Curator's time to collections once the permanent exhibitions were in place became a goal of the Collections Committee and some initial steps were taken while exhibition installation was still underway. In 2005, an NEH Preservation Assistance grant funded a general preservation survey of the collections by a professional conservator. In May 2006, a second PAG was submitted to implement the conservator's recommendations for immediate remedial rehousing of small and medium sized objects.

A collections management inventory and intellectual control project was specifically identified in the Strategic Directions identified by the Board of Trustees in January 2006.

Investment in Institutional Capacity and Long-term Impact

The museum is approaching an important milestone in its institutional history. The museum's creation in 1979 was essentially an attempt by city officials to preserve a local historical landmark building, Ontario's 1936-37 City Hall. Displays and programs were installed, but early staff members, though dedicated and well-meaning, had little professional training. Through programs like MAP and the Long Range Interpretive Programs plan, museum staff, board and volunteers redefined the museum's mission and articulated the basic elements of modest, but professional operations. Thanks to gradually increasing city support and significant grant funding for exhibitions from the National Endowment for the Humanities, local foundations and individuals and from IMLS for development of the Docent Program, the museum now has an excellent programmatic infrastructure in place for serving its audience. Important local collections have been acquired by the museum but they must be professionally managed if the museum is to make full use of them for future exhibitions and programs and to fulfill its stewardship and public trust responsibilities. This project has long been needed to improve the museum's ability to care for and utilize its collections. Although the museum expects to go forward with this project with or without the support of this MFA grant, it is estimated that without IMLS support it will take approximately 6 years to complete the project. If funded, this IMLS project will provide the resources to accomplish these goals in a much shorter period of time allowing museum staff to keep up with on-going acquisitions and move forward with other collections projects. Museum staff will be better able to use the collection for exhibitions and public programs. In addition to the existing permanent local history exhibitions which can be updated or enhanced once collections are better researched and understood, the museum has a 560 sq. ft. exhibition gallery intended to house changing exhibitions of 12-18 months on local history topics. Selecting topics and developing these exhibitions will be greatly improved once actual data about the collections is available. With collections data accessible through the database, sub-groups of the collection can be identified for conservation projects. Rehousing projects can be identified in a similar manner to improve storage efficiency, security and accessibility. Further, as the City of Ontario explores expansion and/or addition projects for the museum facility, museum staff will have strong, accurate data available for planning such facilities and for seeking funding.

4. Strategic Plan: Process and Financial Resources

Planning Process and Participants: How the museum arrived at its plan

Formal and informal planning to professionalize the museum's operations has been a part of its operations since 1990 when the first professional director was hired. By utilizing grant-funded professional development

programs like MAP, CAP, and the NEH-funded Long Range Interpretive Programs Plan, the museum received cost effective professional advice and museum staff was able to continue its active public program and exhibition schedule while simultaneously evaluating operations, developing long-range plans, and making significant institutional improvements. These plans, several documents developed at various times, had input from a variety of community stakeholders usually individuals with a formal relationship with the museum as a member of the Board of Trustees or the Museum Associates. This group of people numbered between fifteen and twenty people in comparison to the museum's small staff so community representation was strong. The Long Range Interpretive Programs Plan process included four academic scholars and two local historians in addition to the community representatives. The Museum Board of Trustees and the Museum Associates Board annually identify short and longer-term goals drawn from the museum's larger planning documents. The initial benefit of this planning was to re-order building renovation projects to support program plans. By 2002, over \$700,000 in renovations funded by the Ontario City Council and private contributions were completed including 6000 sq. ft of exhibition space, a 100 seat auditorium, installation of fire and security alarms, seismic upgrades, and restoration of the original clay tile roof. An active temporary exhibition program featuring exhibits rented from temporary exhibition services or developed by museum staff in conjunction with local arts/humanities groups, allowed the museum to increase its visibility and develop associated school and family programs. Two permanent exhibitions were installed -- one completed in January 2003 and the other in March 2006. The museum's collections also grew -- from about 3000 objects in 1990 to over 25,000 today. The Interpretive Plan recommended a minimum professional staffing level of three full-time staff (Director, Curator of Collections, and Curator of Education.) In 2005, planning efforts expanded when the museum completed a Space and Program Study funded by the Ontario Redevelopment Agency in order to identify future space needs to guide the city's land-use decisions as private development entities begin to express interest in the museum's neighborhood. The project was cooperatively defined by the Museum Director and Redevelopment Director and was conducted by a professional museum planning consultant and an architectural firm specializing in cultural facilities. The project included a "Strategic Outlook" developed by the museum consultant and museum staff which projected future size and scope of existing programs and those still envisioned in the Long Range Interpretive Program Plan. The museum consultant calculated the associated square footages, space adjacencies and facilities characteristics for these future needs which the architect used to suggest options for building expansion. In January 2006, the Museum Board of Trustees adopted a set of Strategic Directions excerpted from the Strategic Outlook to guide museum program development for the next few years.

How planning activities improved financial condition

The museum's long-range planning efforts demonstrate a serious, professional approach to conducting our 'business' that engenders confidence among city officials and private supporters that the museum is worthy of investment. By increasing and improving its public programs, the museum built public participation and demand for service which, in turn, led to increased financial support from the city. Since much of the funding for planning was received as grants, the planning processes also demonstrated that outsiders valued the museum's activities. In addition to city and community investment in building renovations, efforts to stabilize the museum's institutional underpinnings included incorporation of a non-profit support group, the Museum of History and Art, Ontario Associates, in 1996 to encourage private support such as membership programs, a year-end annual giving campaign, bi-annual fund-raising event and operation of the museum store. In 1999, the city invested in the museum's program capacity by re-classifying a part-time Registrar position to a full-time Curator. Two years later, a part-time Curator of Education was funded by the city. In 2003, an IMLS Learning Opportunities Grant funded a three-year project to plan and develop a Docent Program which graduated 12 docents in June 2005. Thanks to this increased capacity, school tours increased 27% demonstrating the increased demand for service needed for the City Council to approve converting the part-time Curator of Education position to full-time in July 2006. (A second Docent Training class will begin in January 2007 with

11 recruits identified at the time of this application.) The Long Range Plan's Exhibition Framework provides a balance between permanent local history exhibits and the temporary exhibition programs. Permanent exhibitions provide a known, curriculum responsive, program for local teachers to include in their yearly lesson plans. Temporary exhibitions allow the museum to broaden its audience, generate free publicity several times per year and present opportunities to raise funds for changing programs. Target Stores has provided program funding for the past three years and a recent Smithsonian METLIFE grant supports programs in association with a SITES temporary exhibition to be hosted in early 2007. Two local private foundations have made several grants for exhibits, collections projects and equipment purchases. Private support from individuals has also increased by about 20% since 2002. With a solid programmatic infrastructure in place and two full-time Curators to handle collections management, exhibitions and educational programs, the Museum Director is now able to concentrate on the next phase of institutional growth. In addition to more active grant writing, the Director is working with the Museum Associates on increasing individual giving, business and corporate support and special events. Working with other city departments and agencies, she is able to participate in the city's processes for considering and planning facilities improvements.

5. Appropriateness of Project for Institution, Audience

Intended Audience

The Museum of History and Art, Ontario serves a large audience drawn from several communities in the Los Angeles suburban region known as the Inland Empire. Visitors come from throughout San Bernardino and Riverside counties as well as communities in eastern Los Angeles and northeastern Orange counties. The museum has identified its core audiences as the city of Ontario and the adjacent cities of Montclair, Upland, Rancho Cucamonga and Chino which all share historical roots with Ontario. The combined populations of these communities is nearly 500,000 people overwhelmingly composed of relatively newly arrived residents many of which are families seeking affordable housing. These populations are extremely diverse by any measure – socio-economic backgrounds, age, and ethnicity.

Audience and Institutional Plan; How project will serve audience

The museum's mission statement to interpret local history 'in a broad context' is a direct effort to recognize this audience diversity and provide a framework for serving the community. The museum plans its programming with two guidelines in mind: 1) provide diversity in our programming to interest as many segments of our communities as possible, and 2) interest these communities in the history of Ontario by providing an accessible, affordable and welcoming community presence and by working to ensure that rigorous scholarship characterizes the museum's interpretations of local history including exploration of the diversity that has always been a part of the community's past. Temporary exhibitions in the museum's north wing galleries and the associated educational programs for families and individuals provide great variety in programming. Stand-alone activities – storytelling, artist-led workshops, performing arts – also provide opportunities to reach out to our diverse audience. Permanent exhibitions provide the museum with opportunities to work with academic and community scholars to incorporate emerging scholarship on our area, Southern California and the American West into our presentations.

This project will serve our audience by enabling museum staff to develop future exhibitions and public programs on the history of the region. The Carlson Gallery, adjacent to the main local history exhibitions, has been designated for such exhibitions to explore local topics and issues in more depth than is possible in the main exhibitions. Having better intellectual control of the collections will also allow us to include a local component when the museum hosts temporary exhibitions on larger national or regional issues. The permanent local history exhibitions can be refreshed and or revised as museum staff gains a fuller understanding of the collections. Museum staff will be better able to respond to individual research requests and to work with community partners on any number of projects from anniversaries of local businesses and institutions to chamber of commerce events to school district family expos.

6. Project Resources: Time and Budget

Time

As described above, if awarded, the IMLS-MFA grant funds will have to be appropriated by the Ontario City Council to be added to the city budget. Following notification of grant receipt in mid-July, the Museum Director will begin the process for a First Quarter Budget revision to appropriate IMLS funds for the rest of the city's FY07-08 fiscal year. Generally, First Quarter Budget Reports are approved in late October or early November. Space preparation also can begin between award notification and the actual beginning of the grant period. Work tables for unpacking boxes and examining and numbering artifacts will be moved to designated areas of the collections storage area. A photography area and data entry workstation will also be set up. Filing cabinets with needed paper records – catalog cards, donor records and collections committee minutes -- will be moved to the work area. Existing space used for storage of archival supplies will be evaluated and re-arranged as needed based on expected quantities and types of supplies to be purchased for this project. The Curator can also begin work on some aspects of the purchasing process for the computer equipment – confirming specifications and bids for instance. Similarly, initial arrangements for the Curator to attend the Past Perfect Training workshop can begin.

Once the grant period begins in November, procedures for purchasing the computer equipment will begin and the Curator will attend the PastPerfect training workshops if, as in 2006, they are scheduled for November 2007. Otherwise, the Curator will attend the training workshops at the first available opportunity.

Recruitment for the Museum Assistants will begin in November 2007 with anticipated start dates of January 7, 2008. Grant funds are requested for each of the Museum Assistants to work 32 hours per week. This equals a total of 96 work weeks at 64 person hours per week, or 6144 person hours through the grant period ending October 31, 2009. Collections currently occupy 90 shelf or 'shelf equivalent' units using a typical 60"x 48" storage unit shelf as a measure. Museum staff have estimated that it will take an average of 1.5 weeks (60 person hours) to fully process one shelf/shelf equivalent for a total of 5400 hours. This is a relatively comfortable schedule leaving 11.6 weeks over the two year grant period for dealing with difficult issues, researching 'problem' objects and to provide time for holiday breaks, sick days, and vacation breaks. The first team conference at the three month marker will evaluate this estimate, specific procedures, and determine how best to utilize volunteers

Role of Project in overall museum activities

This project will have a high priority in regard to overall museum activities. As described above, re-directing staff and other resources to collections at this point in the museum's history is part of the larger institutional plan. Specifically, the conversion of the Curator of Education to full-time status in July 2006 was a key component to freeing the Curator from exhibitions and public program support in order to concentrate on collections. The Curator will retain other duties associated with temporary exhibits, programs and general collections management but is still expected to devote 40% time to this collections project.

Budget/Resources.

IMLS grant funds will be appropriated with the museum's city budget at first through a first quarter budget revision for FY 07-08 and as part of the city's regular budgeting process for the following year. IMLS funds will be assigned specific department and grant project numbers to track the funds separately from the city's general fund. The museum's matching contribution to this project includes salaries and benefits for the Curator and Director, a portion of supplies and materials and a portion of the computer equipment purchase as well as all indirect expenses. City departments expected to provide support include Human Resources, Purchasing, Information Services and Accounting. Existing facilities and equipment to be used for this project include a dedicated work area within the main collections storage area, worktables, computer workstation, and access to all day-to-day office supplies and equipment. Public Works staff will be available to move tables, filing cabinets and any other large/heavy equipment during the project – as well as to assist with any large, heavy or awkward artifacts.

7. Project Resources: Personnel and Technology

Personnel. The project was designed by the Museum Director and Museum Curator. The Museum Director will serve as the Project Director and Administrator. She has been Director of the Museum of History and Art, Ontario for over 16 years. Her early museum experience was as a Registrar and Curator. More recently, she has been responsible for all aspects of the museum's budgeting and financial management, liaison with city departments and compliance with city procedures. She has managed grants from private, state and national sources including an IMLS-Learning Opportunities Grant, three National Endowment for the Humanities grants and numerous grants from local foundations and private funders. She has a Master's Degree in museum studies from the University of California, Riverside. The Museum Curator, also a graduate of the museum studies program at UC Riverside, served the museum as part-time Registrar from 1993 until 1999 when she became the museum's first Curator. Regrettably, she is no longer with the museum due to a serious illness, however, in addition to working with the director on the design of this project, she has left a general workplan as well as numerous notes and files. The Museum Curator vacancy is expected to be filled by Spring 2007 giving the new Curator several months to become familiar with the collections before this project begins. The Museum Curator will supervise the Museum Assistants, manage the day-to-day procedures and workflow and evaluate the project's general progress and challenges. The Curator will also handle all follow up on objects for which legal title is uncertain.

The job description for the Museum Curator is attached. The position requires three years of experience and we anticipate being able to recruit a candidate with strong collections management experience. (Please note that, by design, the Curator job description includes roughly equal responsibilities for Collections, Exhibitions and Education. The job description applies to both the Curator and the Curator of Education because as a small institution, the Curators must be able to back up each other. We will emphasize the collections management elements in the recruitment and selection process).

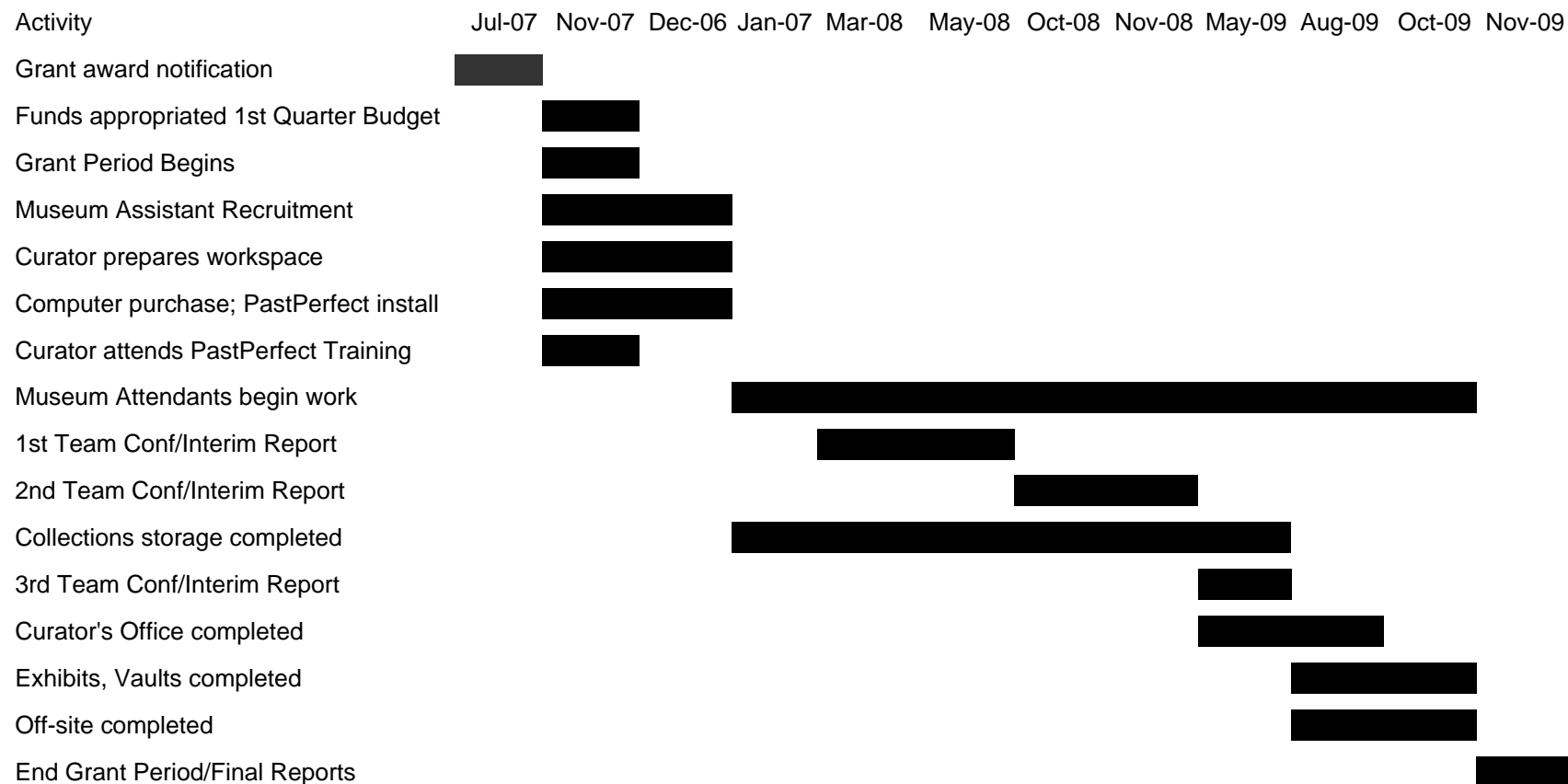
Two Museum Assistants will be hired with IMLS-MFA funds to conduct the inventory and associated activities. The Museum Assistants will be trained and engaged in all aspects of the project to minimize any loss of time due to illness or vacancy. The Museum Assistant job description is also attached. This description is derived from the previous Registrar job description. As with the Curator description, other areas of responsibility are included to allow for flexibility in hiring to meet our staffing needs without having to develop numerous job descriptions.

Technology

The museum currently owns a licensed version of PastPerfect collections management software. Following discussions with museum staff about the scope of this project and future needs, the City of Ontario's IT Department contacted Pasttime Software for specifications and price quotes for an upgrade. The IT department then spec'd the hardware requirements and solicited a quote from Dell for hardware. Technology purchases and upgrades include a Dell Poweredge SC440 (or equivalent) server with Tape Back-up and Monitor, a Dell D610 lightweight laptop (or equivalent), and a digital camera and accessories including a wireless remote, articulated mount and lighting. Software purchases include a PastPerfect Version 4.0 upgrade, network upgrade for 2-5 users, a multimedia upgrade and annual support. Detailed specifications for these purchases are included in the Budget Justification attached. Funds are also requested for the Curator to attend a two-day training session on PastPerfect presented by the vendor, Pasttime Software, Inc.

Institute of Museum and Library Services
Museums for America
Museum of History and Art, Ontario
15-Nov-06

Schedule of Completion



BUDGET FORM - PAGE FOUR

Section B: Summary Budget

	\$ IMLS	\$ Cost Share	\$ TOTAL COSTS
1. Salaries and Wages	76,151.00	53,588.00	129,739.00
2. Fringe Benefits	2,041.00	9,162.00	11,203.00
3. Consultant Fees	0.00	0.00	0.00
4. Travel	1,109.00	0.00	1,109.00
5. Supplies and Materials	5,080.00	2,440.00	7,520.00
6. Services	190.00	0.00	190.00
7. Student Support			0.00
8. Other Costs	6,159.00	2,500.00	8,659.00
TOTAL DIRECT COSTS (1–8)	90,730.00	67,690.00	158,420.00
9. Indirect Costs		23,214.00	23,214.00
TOTAL COSTS (Direct and Indirect)	90,730.00	90,904.00	181,634.00

Project Funding for the Entire Grant Period

1. Grant Funds Requested from IMLS	90,730.00
2. Cost Sharing:	
a. Cash Contribution	90,904.00
b. In-Kind Contribution	
c. Other Federal Agencies*	
d. TOTAL COST SHARING	90,904.00
3. TOTAL PROJECT FUNDING (1+2d)	181,634.00
% of Total Costs Requested from IMLS	50.00%

* If funding has been requested from another federal agency, indicate the agency's name: